

# OFFICE SET UP IN CWS/CMS



Presented by:  
Office of System Integration  
CWS/CMS Office  
February 2011

# Office Set Up

- To use CWS/CMS, “logical” office(s) will need to be set up in the application. This process is referred to as Office Set Up.
- A logical office is the conceptual form of your business practice workflows in the CWS/CMS application.

# Office Setup Preview



Create New Office



Create Staff Person

- Assign Authority and Privileges



Create Assignment Unit

- Grant Supervisor Staff Authority

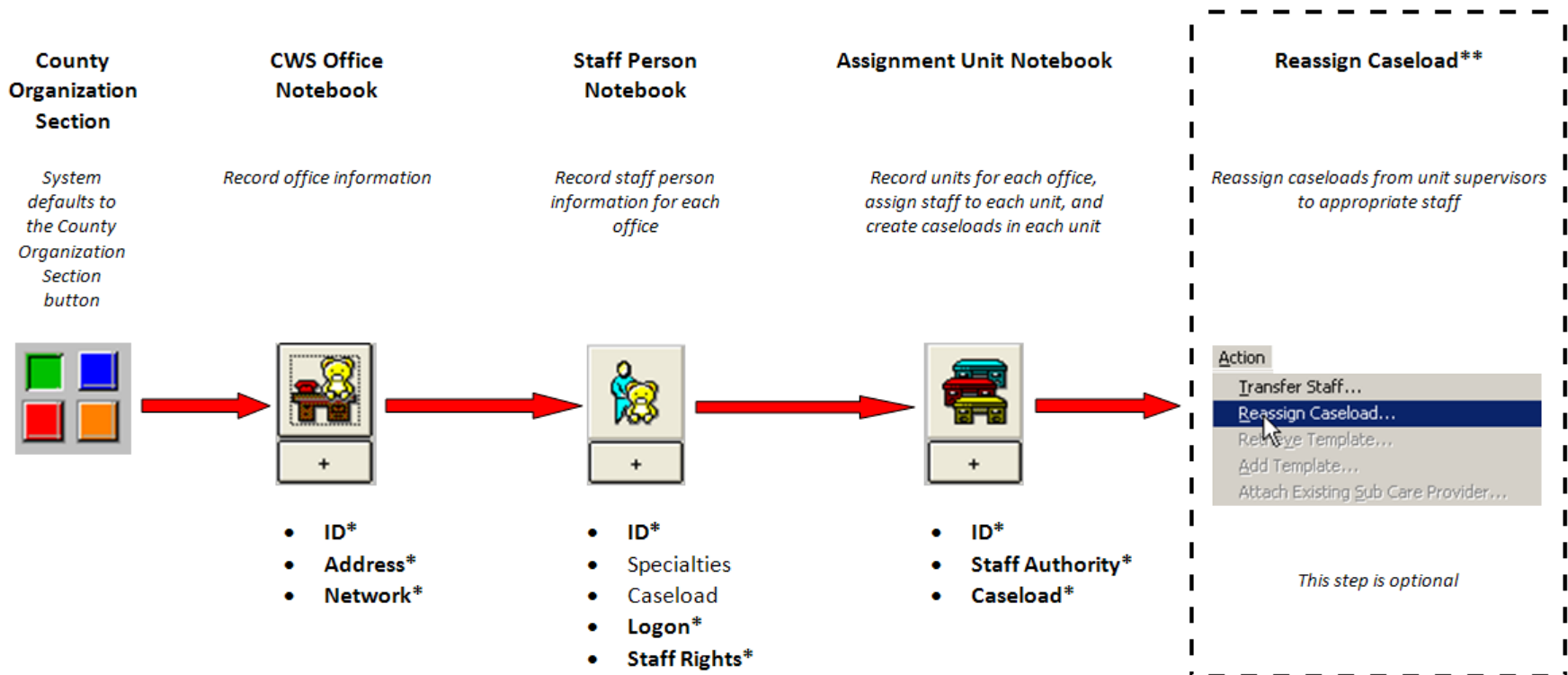


Create a Caseload



Assign Caseload to a Staff Person

# Office Setup Preview



\* This page must be completed at this stage in the process

\*\* Because the In-box Caseload is automatically assigned to the supervisor, this step is not necessary to assign a caseload to the supervisor of the assignment unit.

# CREATE NEW OFFICE



# What is a CWS/CMS Application Office?

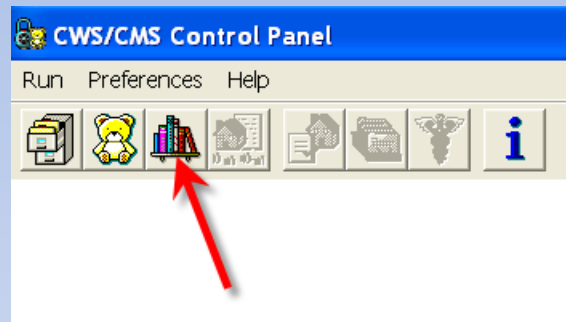
- A logical office is an application office in CWS/CMS.
- An application office is not necessarily a physical site.
- Consider this: If work within the same management structure is also in one application office, workflow improves.
  - For example, supervisors who work together can provide backup coverage even in different physical sites.

# Staff to Include in an Application Office

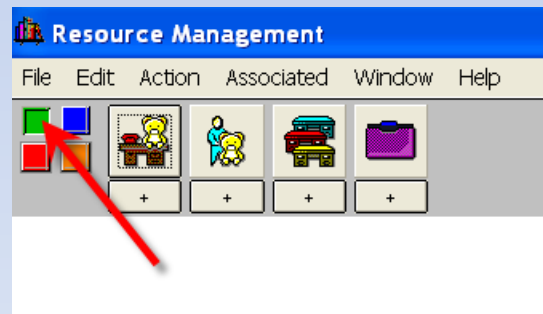
- Take into account how the users interact and what dependencies they have on one another.
  - Who reports to the specific supervisor?
  - Do supervisors cover for one another?
- The application office should be built around your workflow!

# Creating a New Office in CWS/CMS\*

- On the CWS/CMS Control Panel, click on the *Resource Management* application (book icon)



- You are now in Resource Management. Click on the *County Organization* section (green button)



The person that performs this function must have a User ID with *County Administrator* Level of Authority and *Resource Management* Privilege.



# Creating a New Office in CWS/CMS

- Click on “+” for *Create New CWS Office*



Before creating anything new in CWS/CMS, a search should be conducted to insure that it does not already exist.

# Creating a New Office in CWS/CMS

## Office - ID Page

**Resource Management - [CWS Office {}]**

File Edit Action Associated Window Help

Icons: [Color Swatches] [Person at Desk] [Person] [Truck] [Briefcase]

Buttons: [ + ] [ + ] [ + ] [ + ]

Tabbed Interface: ID | Address | Network

**Identification**

Agency: [Yellow Field]

Department/Division: [Yellow Field]

Office Name: [Yellow Field]

Office Number: [Field]

☐ Headquarters

☐ Inactive

Geographic Region: [Field]

Comments: [Text Area]

**Contact**

Name: [Dropdown]

Job Title: [Field]

Phone Number: [Yellow Field] - [Field]

Ext: [Field]

Fax Number: [Field]

Message Number Ext: [Field]

Director's Name and Title: [Field]

County: [Sacramento]

Location County: [Field]

**Adoption Information**

Agency Code: [Field]

**Catchment Area**

+ ZIP Code: [Field]

**Complete the fields on the ID page. Yellow fields are mandatory. They must be filled in.**

# Creating a New Office in CWS/CMS

## Office - Address Page

Resource Management - [CWS Office []]

File Edit Action Associated Window Help

Address Network

+	Street Number	Street Name	City	State	Zip Code	Zip Ext	CACI
1							

Street No. Street Name

City State ZIP ZIP Ext

Child Abuse Central Index (CACI)

☐ CACI Address For County

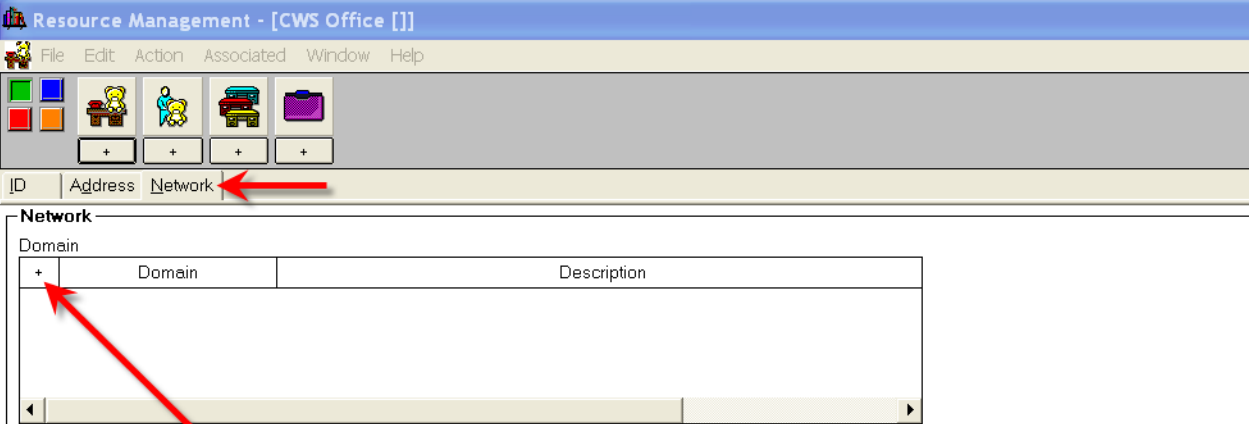
Attn:

Click the "+" to enter a new address.

An "Office" can have multiple addresses associated to it.

# Creating a New Office in CWS/CMS

## Office - Network Page



Resource Management - [CWS Office {}]

File Edit Action Associated Window Help

Network

ID	Address	Network
Domain		
+	Domain	Description

When you click the "+", the Select Domain list box will appear. Select the domain that you want for this office from this list.

Select Domain

Domain/Description

- CWS0000A/BOULDER - Server Management
- CWS0101A/ALAMEDA - North Oakland
- CWS0110A/ALAMEDA - Eden
- CWS0115A/ALAMEDA - Harbor Bay
- CWS0116A/ALAMEDA - Assessment Ctr
- CWS0201A/ALPINE - Markleeville
- CWS0301A/AMADOR - Jackson
- CWS0401A/BUTTE - #3 County Ctr Rd
- CWS0402A/BUTTE - #1 County Ctr Rd
- CWS0402A/BUTTE - Adult Services Division
- CWS0403A/BUTTE - 1960 Feather Rvr
- CWS0404A/BUTTE - Chico
- CWS0501A/CALAVERAS - Scl Svcs Bldg

OK Cancel Help

# Creating a New Office in CWS/CMS

To finish creating an office, a *staff person*, *assignment unit*, and *caseload* must be entered before the office can be saved.

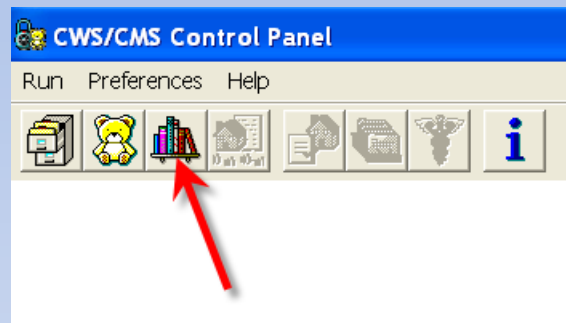
# CREATE STAFF PERSON

Assign Authority and Privileges

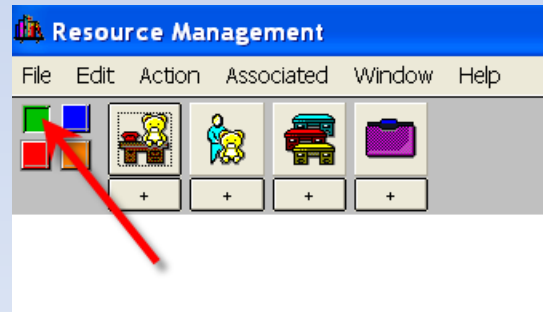


# Creating a Staff Person in CWS/CMS

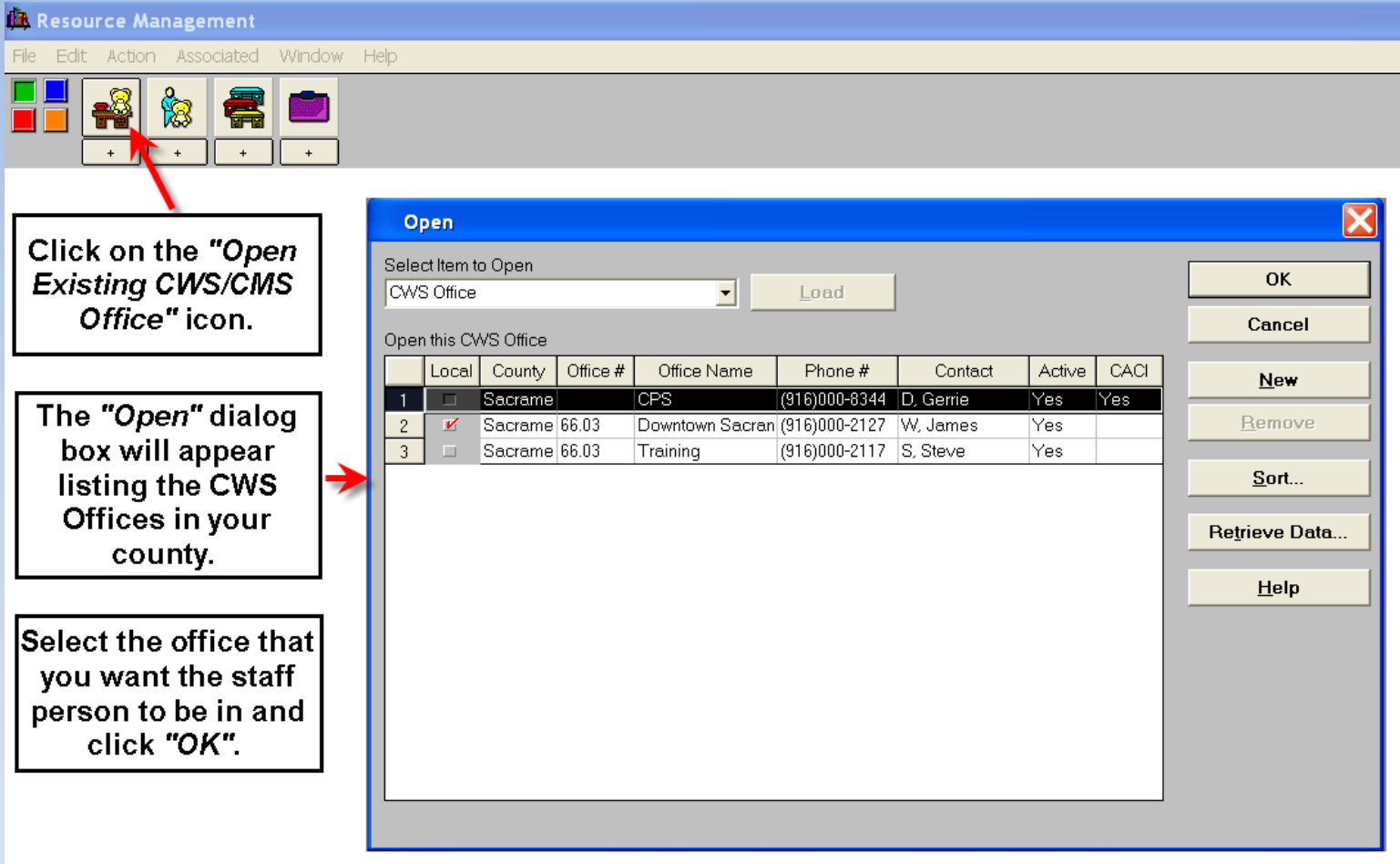
- On the CWS/CMS Control Panel, click on the *Resource Management* application (book icon)



- You are now in Resource Management. Click on the *County Organization* section (green button)



# Creating A Staff Person in CWS/CMS



**Resource Management**

File Edit Action Associated Window Help

Click on the "Open Existing CWS/CMS Office" icon.

The "Open" dialog box will appear listing the CWS Offices in your county.

Select the office that you want the staff person to be in and click "OK".

**Open**

Select Item to Open  
CWS Office [v]  
Load

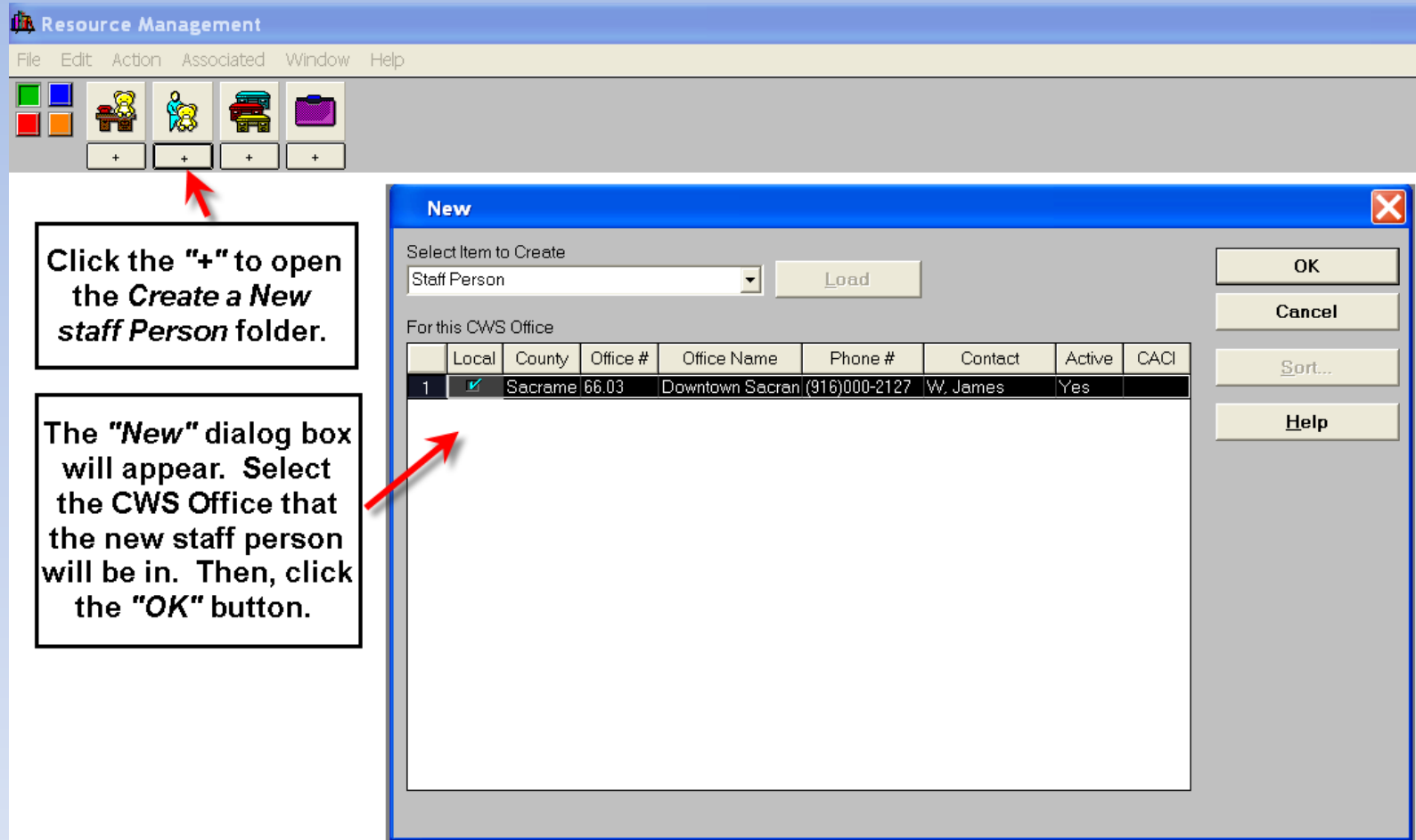
Open this CWS Office

	Local	County	Office #	Office Name	Phone #	Contact	Active	CACI
1	<input type="checkbox"/>	Sacrame		CPS	(916)000-8344	D, Gerrie	Yes	Yes
2	<input checked="" type="checkbox"/>	Sacrame	66.03	Downtown Sacran	(916)000-2127	W, James	Yes	
3	<input type="checkbox"/>	Sacrame	66.03	Training	(916)000-2117	S, Steve	Yes	

OK  
Cancel  
New  
Remove  
Sort...  
Retrieve Data...  
Help



# Creating a Staff Person in CWS/CMS



The screenshot shows the 'Resource Management' application window. The menu bar includes 'File', 'Edit', 'Action', 'Associated', 'Window', and 'Help'. The toolbar contains several icons, including a folder icon with a plus sign. A red arrow points to this icon, with a text box explaining its function. Another red arrow points to the 'New' dialog box, which is open and shows a table of CWS Offices. The 'New' dialog box has a title bar with a close button. It contains a 'Select Item to Create' dropdown menu set to 'Staff Person' and a 'Load' button. Below this is a section titled 'For this CWS Office' containing a table with columns: Local, County, Office #, Office Name, Phone #, Contact, Active, and CACI. The table has one row with the following data: 1, [checked], Sacrame, 66.03, Downtown Sacran, (916)000-2127, W, James, Yes. To the right of the table are buttons for 'OK', 'Cancel', 'Sort...', and 'Help'.

Click the "+" to open the *Create a New staff Person* folder.

The "New" dialog box will appear. Select the CWS Office that the new staff person will be in. Then, click the "OK" button.

	Local	County	Office #	Office Name	Phone #	Contact	Active	CACI
1	<input checked="" type="checkbox"/>	Sacrame	66.03	Downtown Sacran	(916)000-2127	W, James	Yes	

# Creating a Staff Person in CWS/CMS

## Staff Person - ID Page

**Resource Management - CWS Office [Downtown Sacramento] - [Staff Person [, ]]**

File Edit Action Associated Window Help

Icons: [Color Swatches] [Person at desk] [Person with magnifying glass] [Person with magnifying glass] [Folder]

Buttons: [ + ] [ + ] [ + ] [ + ]

Tabs: ID | Specialties | Caseload | Logon | Staff Rights

**Identification**

Prefix: [ ] First: [ ] Middle: [ ] Last: [ ] Suffix: [ ]

Primary Phone: [ ( ) - ] Ext: [ ] ☐ Telecommuter Start Date: [ 02/01/2011 ] End Date: [ ]

E-mail Address: [ ]

Job Title: [ ] Licensing Worker ID: [ ]

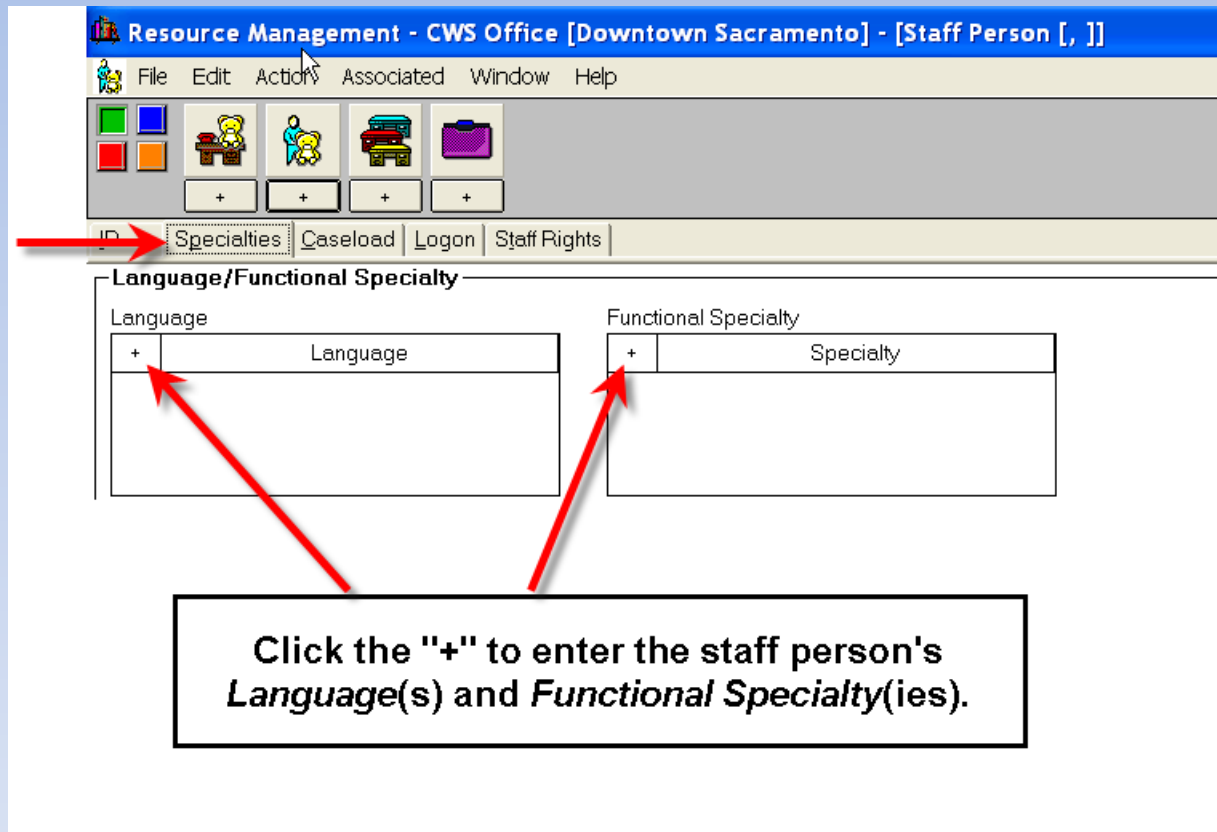
CWS Office Address: [ 800 No Way, Sacramento, California 95810- ]

Availability/Location Description: [ ]

**Complete all mandatory (yellow) and known fields on the ID page of the Staff Person notebook.**

# Creating a Staff Person in CWS/CMS

## Staff Person - Specialties Page



Resource Management - CWS Office [Downtown Sacramento] - [Staff Person [, ]]

File Edit Actions Associated Window Help

Specialties Caseload Logon Staff Rights

Language/Functional Specialty

Language	
+	Language

Functional Specialty	
+	Specialty

Click the "+" to enter the staff person's *Language(s)* and *Functional Specialty(ies)*.

# Creating a Staff Person in CWS/CMS

## Staff Person - Logon Page

Resource Management - CWS Office [Downtown Sacramento] - [Staff Person [B., Snoopy]]

File Edit Action Associated Window Help

Logon Information

Logon ID	Start Date	End Date	Domain
<b>Click the "+" in the Logon Information grid.</b>			

Logon ID:  Domain/Description:

Start Date:  End Date:

**A password must be between 6-8 characters with at least one numeric value. The numeric value can not be the first or last character.**

**Create Logon ID**

Staff Person  
A Logon ID will be created for

Name:

County:

Domain/Password  
Please select the Domain and specify an initial password for this Logon ID:

Domain:

Password:

Creating a Logon ID may take a few minutes.

OK Cancel Help

**Logon Confirmation**

Logon ID Successfully Created

Name:

County:

Domain:

Logon ID:

Password:

OK

# Staff Rights

## Level of Authority and Privileges

- *Level of Authority* (LOA) is used in combination with *Privileges* to provide access to different kinds of information in CWS/CMS.

# Authorities and Privileges

- A user's access to information in CWS/CMS is contingent upon the level of authority and the privileges assigned to the user's logon ID and password.
- A county system administrator assigns authorities and privileges to staff persons, allowing them access to specific CWS/CMS tools and specific uses of those tools according to their job responsibilities.

# Level of Authority (LOA)

- LOA is the first level of access to information that is contained in CWS/CMS. LOA provides for layers of control within a county's CWS/CMS organization and are limited to functions within the Resource Management application of CWS/CMS. These levels do not by themselves grant any capabilities over referrals, cases, or caseloads. The following table lists the hierarchy of LOA in CWS/CMS for county users.
- Every staff person has a LOA. In general, your LOA determines which notebooks you have access to in Resource Management and defines the geographic range of notebooks you can work with.

Level of Authority	Create/Delete Office	Create Assignment Units	Create Caseloads	Create Staff	Create Logon IDs	Assign LOA & Privileges
County Administrator	C	C	C	C	C	C
Office Administrator	N/A	O	O	O	O	O
User	N/A	N/A	N/A	N/A	N/A	N/A

C = County

O = Office

# Level of Authority (LOA)

- A County or Office Administrator must hold the Resource Management Access Privilege in order to exercise any capabilities provided by their assigned LOA.
- Individuals holding one LOA may only assign lesser LOA than their own.



# Privileges - Categories

- Privileges determine the applications, notebooks, and interfaces to which the user has access.
- There are four categories of privileges:

Category	Privileges
Access Authority	Provides general use of CWS/CMS applications and many specialized tools and notebooks
Interface Authority	Provides access to information systems that interface with CWS/CMS
Limited Access Authority	Provides access to cases and referrals that are restricted from general viewing including cases marked as sealed or sensitive
Override Authority	Permits user access to those cases and referrals for which one has not been directly assigned

# Access Authority Privileges

The four most common Access Authority Privileges given to probation staff are:

Access Authority Privilege	Description
CWS Case Management System	Allows access to Client Services. This is where referral/cases are created and managed.
Closed Case/Referral Update	Allows user to update areas in a closed case or referral to which their county had the primary or secondary assignment at the time it was closed.
Non-CWD	Allows the selection of Non-CWD Foster Care as an intervention reason in the Client Services application so one can manage Probation cases.
Resource Management	Allows access to Resource Management where the office, assignment units and staff are created.

# Access Authority Privileges

- Other Access Authority privileges include:

Access Authority Privilege
Adoption
County License Case Management
Program Management (PM) Reports
Resource Management Placement Facility Maintenance
System Administration

# Override Authority Privilege

Override Authority	Description
Countywide Read	Allows user to have read access to any case or referral in your county, excluding those marked as sealed or sensitive.
Countywide Read/Write	Same as Countywide Read but allows Write access too.
Office-wide Read	Allows user to have read access (only via the Find Folder function in Client Services) to any case or referral in your office, excluding those marked as sealed or sensitive.
Office-wide Read/Write	Same as Office-wide Read but allows Write access too.

# Creating a Staff Person in CWS/CMS

## Staff Person - Staff Rights Page

Resource Management - CWS Office [Downtown Sacramento]

File Edit Action Associated Window Help

Staff Person [D, Jane]

ID Specialties Caseload Logon **Staff Rights**

**Staff Rights**

	Category	Privilege
+		

Click the "+" to enter the staff person's privileges and level of authority.

Category Privilege

Level of Authority

User

# Creating a Staff Person in CWS/CMS

## Staff Person - Staff Rights Page

- Select a Privilege Category

Resource Management - CWS Office [Downtown Sacramento] - [Staff Person [D, Jane]]

File Edit Action Associated Window Help

Icons: [Color Swatches] [Person at Desk] [Person at Computer] [Person at Printer] [Briefcase]

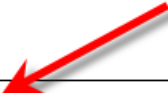
ID Specialties Caseload Logon Staff Rights

### Staff Rights

	Category	Privilege
+		
1		

Category: <None> (dropdown menu open showing: <None>, Access Authority, Interface Authority, Limited Access Authority, Override Authority)

Privilege: (empty dropdown menu)



# Creating a Staff Person in CWS/CMS

## Staff Person - Staff Rights Page

- Select a Privilege for the Category

Resource Management - CWS Office [Downtown Sacramento] - [Staff Person [D, Jane]]

File Edit Action Associated Window Help

+

ID Specialties Caseload Logon Staff Rights

Staff Rights

	Category	Privilege
+		
1		

Category

Access Authority

Level of Authority

User

Privilege

Closed Case/Referral Update

<None>

Adoptions

Assignment Match

Bulletin Administrator

Cell Phone

Closed Case/Referral Update

Code Table Maintenance

County License Case Management

CWS Case Management System

Fingerprint Management Reports

# Creating a Staff Person in CWS/CMS

## Staff Person - Staff Rights Page

- Select a Level of Authority

Resource Management - CWS Office [Downtown Sacramento] - [Staff Person [D, Jane]]

File Edit Action Associated Window Help

Staff Rights

	Category	Privilege
1	Access Authority	CWS Case Management System

Category: Access Authority Privilege: CWS Case Management System

Level of Authority

Office Administration

<None>

County Administration

Global Administration

Office Administration

State Administration

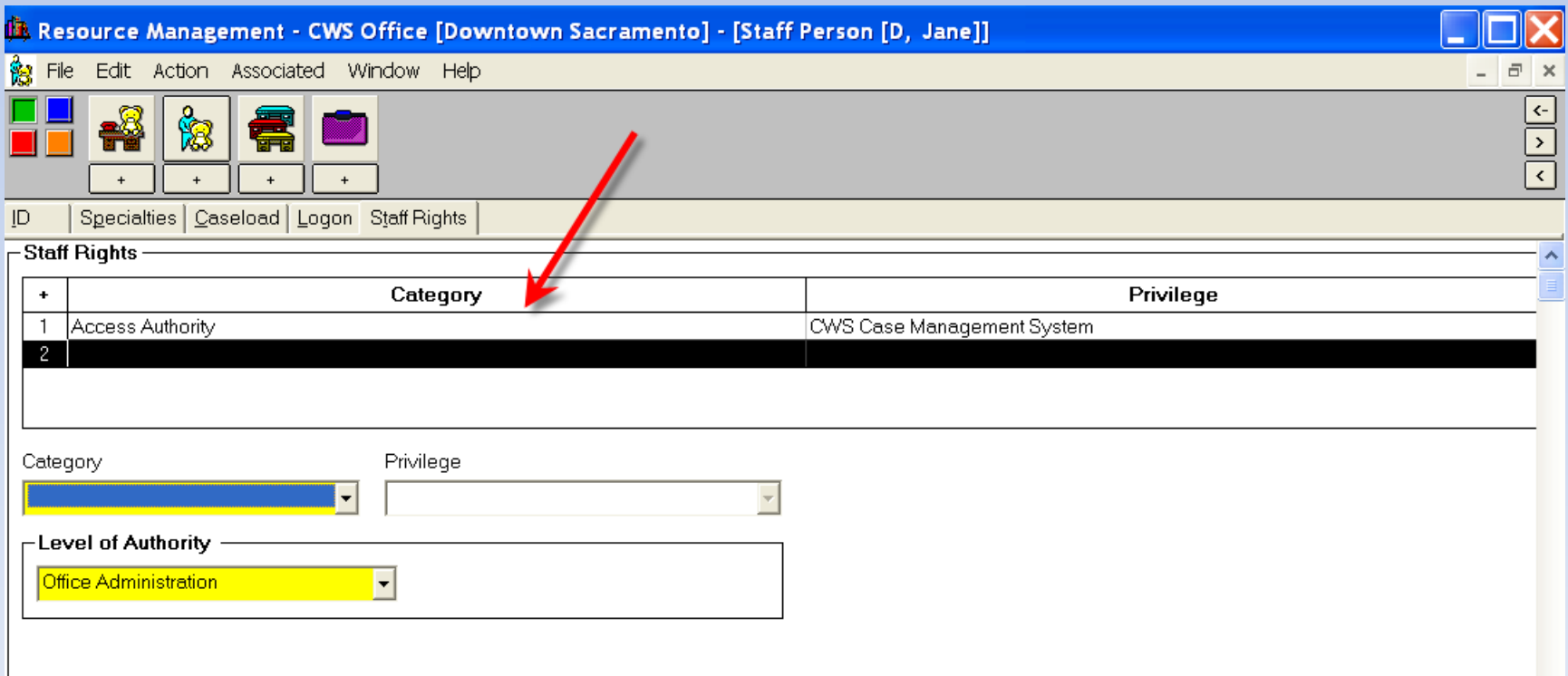
User



# Creating a Staff Person in CWS/CMS

## Staff Person - Staff Rights Page

- The information will now appear in the Staff Rights grid.



Resource Management - CWS Office [Downtown Sacramento] - [Staff Person [D, Jane]]

File Edit Action Associated Window Help

Staff Rights

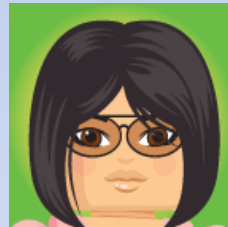
	Category	Privilege
1	Access Authority	CWS Case Management System
2		

Category:  Privilege:

Level of Authority:

# CREATE ASSIGNMENT UNIT

Grant Supervisor Staff Authority



# Creating an Assignment Unit

- After creating the *Office* and creating a *Staff Person* (and assigning authorities and privileges to that staff person) to put in the Office, you are now ready to set up your *Assignment Unit*.
- *Assignment Units* are groupings of staff persons performing similar functions and reporting to the same assignment unit supervisor.
- Each *Office* must have at least one *Assignment Unit* called the *Assignment Desk* which is the receiving point for new referrals and cases in the *Office*.

# Creating an Assignment Unit

Resource Management - [CWS Office [ER One]]

File Edit Action Associated Window Help

Click on the **Open Existing Assignment Unit** notebook.

Select the **CWS Office** that was created.

An **Assignment Desk** is automatically created for each office.

Click the **OK** button.

**Open**

Select Item to Open  
Assignment Unit

For this CWS Office

	Local	County	Office #	Office Name	Phone #	Contact	Active	CACI
1	<input checked="" type="checkbox"/>	Sacrame	66.03	Downtown Sacran	(916)000-2127	W, James	Yes	
2	<input checked="" type="checkbox"/>	Sacrame		ER One	(999)999-9999		Yes	

Open this Assignment Unit

	Local	Name	Supervisor	Phone
1	<input checked="" type="checkbox"/>	Assignment Desk		
2	<input checked="" type="checkbox"/>			
3	<input checked="" type="checkbox"/>			

OK  
Cancel  
New  
Remove  
Sort...  
Help

# Creating an Assignment Unit

## Assignment Unit - ID Page

Complete known  
fields on the *ID* page  
of the Assignment  
Unit notebook.

Resource Management - CWS Office [Downtown Sacramento]

File Edit Action Associated Window Help

Assignment Unit [Assignment Desk]

ID Staff Authority Caseload

**Unit Identification**

Unit Name: Assignment Desk

Phone Number: ( ) -

Ext:

Functional Specialty: + Specialty

Start Date: 10/01/2003

End Date:

☒ Assignment Desk

# Creating an Assignment Unit

## Assignment Unit - Staff Authority Page

Click the **Staff Authority** page tab.

Staff Authority defines a staff person's role in the management of caseloads within an assignment unit.

By default, the first person created will be the Unit Supervisor.

Resource Management - CWS Office [Downtown Sacramento]

File Edit Action Associated Window Help

Assignment Unit [Assignment Desk]

ID Staff Authority Caseload

Staff Authority

	Name	Authority
1	C. Michael	Supervisor
2	C. Michael	None
3	J. Robert	None

Staff Name  
C. Michael

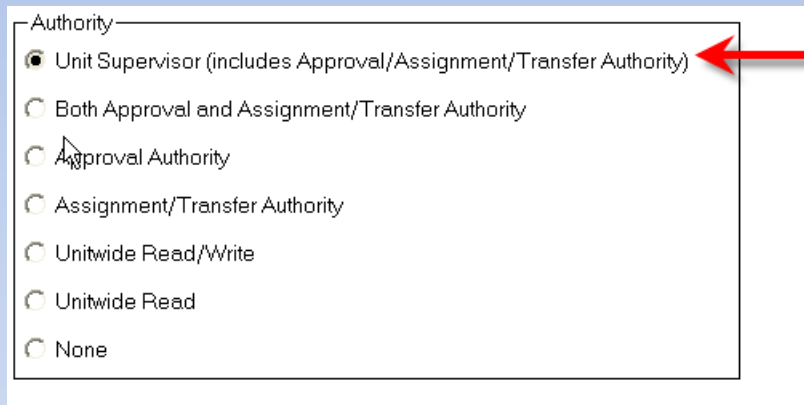
Authority

- ☒ Unit Supervisor (includes Approval/Assignment/Transfer Authority)
- ☐ Both Approval and Assignment/Transfer Authority
- ☐ Approval Authority
- ☐ Assignment/Transfer Authority
- ☐ Unitwide Read/Write
- ☐ Unitwide Read
- ☒ None

# Staff Authority

## Unit Supervisor

- A unit supervisor with CWS Case Management Privilege has authority within their assignment unit to:
  - View or update any case or referral
  - Approve requests submitted by staff persons
  - Assign a case or referral to a staff person
- A unit supervisor with Resource Management privilege has authority to:
  - Add, update, or remove a caseload within the assignment unit
  - Add or remove functional specialties
  - Add, modify, or remove staff persons
  - Transfer a caseload between staff persons within their assignment unit



A screenshot of a web form titled 'Authority'. It contains a list of radio button options. The first option, 'Unit Supervisor (includes Approval/Assignment/Transfer Authority)', is selected and highlighted with a red arrow. A mouse cursor is visible over the second option, 'Both Approval and Assignment/Transfer Authority'.

Authority

- ☒ Unit Supervisor (includes Approval/Assignment/Transfer Authority)
- ☐ Both Approval and Assignment/Transfer Authority
- ☐ Approval Authority
- ☐ Assignment/Transfer Authority
- ☐ Unitwide Read/Write
- ☐ Unitwide Read
- ☐ None

# Staff Authority

Both Approval and Assignment/Transfer Authority

Authority

- ☐ Unit Supervisor (includes Approval/Assignment/Transfer Authority)
- ☒ Both Approval and Assignment/Transfer Authority
- ☐ Approval Authority
- ☐ Assignment/Transfer Authority
- ☐ Unitwide Read/Write
- ☐ Unitwide Read
- ☐ None

When selected, indicates this staff person can approve requests and make or transfer case and referral assignments to other caseloads.



# Staff Authority

## Approval Authority

Authority

- ☐ Unit Supervisor (includes Approval/Assignment/Transfer Authority)
- ☐ Both Approval and Assignment/Transfer Authority
- ☒ Approval Authority
- ☐ Assignment/Transfer Authority
- ☐ Unitwide Read/Write
- ☐ Unitwide Read
- ☐ None

When selected, indicates this staff person can approve requests submitted by other staff persons in the assignment unit.

# Staff Authority

## Assignment/Transfer Authority

Authority

- ☐ Unit Supervisor (includes Approval/Assignment/Transfer Authority)
- ☐ Both Approval and Assignment/Transfer Authority
- ☐ Approval Authority
- ☒ Assignment/Transfer Authority
- ☐ Unitwide Read/Write
- ☐ Unitwide Read
- ☐ None


When selected, indicates this staff person can make or transfer case and referral assignments to other caseloads.

# Staff Authority

## Unitwide Read/Write

Authority

- ☐ Unit Supervisor (includes Approval/Assignment/Transfer Authority)
- ☐ Both Approval and Assignment/Transfer Authority
- ☐ Approval Authority
- ☐ Assignment/Transfer Authority
- ☒ Unitwide Read/Write
- ☐ Unitwide Read
- ☐ None




When selected, indicates this staff person can view, modify, and add to all cases and referrals assigned to this assignment unit, excluding those which are marked as Sealed or Sensitive.

# Staff Authority

## Unitwide Read

Authority

- ☐ Unit Supervisor (includes Approval/Assignment/Transfer Authority)
- ☐ Both Approval and Assignment/Transfer Authority
- ☐ Approval Authority
- ☐ Assignment/Transfer Authority
- ☐ Unitwide Read/Write
- ☒ Unitwide Read
- ☐ None




When selected, indicates this staff person has read-only privilege to access all cases and referrals assigned to this assignment unit, excluding those which are marked as Sealed or Sensitive.

# Staff Authority

None

Authority

- ☐ Unit Supervisor (includes Approval/Assignment/Transfer Authority)
- ☐ Both Approval and Assignment/Transfer Authority
- ☐ Approval Authority
- ☐ Assignment/Transfer Authority
- ☐ Unitwide Read/Write
- ☐ Unitwide Read
- ☒ None



When selected, indicates this staff person is connected to the assignment unit, but can not approve requests, transfer cases, or make an assignment to another caseload.

# CREATE A CASELOAD

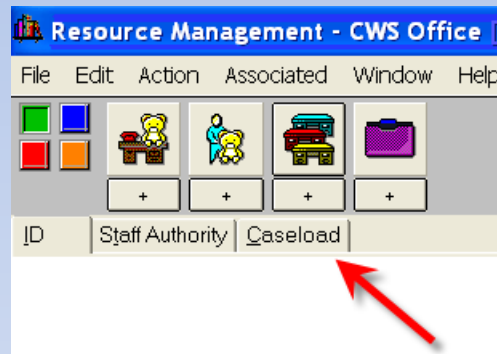


# Caseload In CWS/CMS

- Thus far, you have:
  - Created an Office,
  - Created a *Staff Person* (and assigned them a *level of authority and privileges*), and
  - Created an *Assignment Unit*.
- Now, a caseload must be created before the office can be saved.

# Creating a Caseload

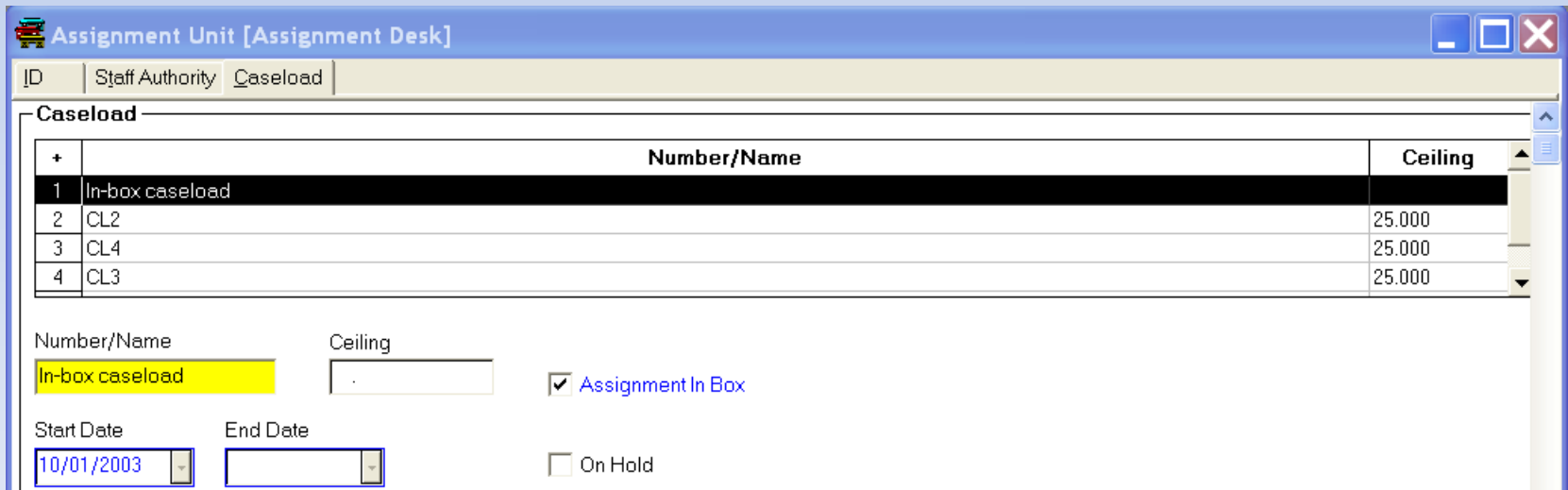
- Click on the *Caseload* page in the *Assignment* notebook.





# Creating a Caseload

- By default, the In-Box caseload has already been created and assigned to the supervisor
- New caseloads are automatically assigned to the supervisor of the unit. The supervisor will then reassign the caseload to the user.



Assignment Unit [Assignment Desk]

ID | Staff Authority | Caseload

**Caseload**

+	Number/Name	Ceiling
1	In-box caseload	
2	CL2	25.000
3	CL4	25.000
4	CL3	25.000

Number/Name: In-box caseload

Ceiling: .

☒ Assignment In Box

Start Date: 10/01/2003

End Date:

☐ On Hold

# Creating Caseloads

- Supervisors and Office Administrators can create and assign caseloads
- They must have Resource Management privilege

# Creating a Caseload in CWS/CMS

- Click on *Resource Management* (book icon)



- Click on the *County Organization* section (green button)



# Creating A Caseload in CWS/CMS

**Resource Management**

File Edit Action Associated Window Help

Click on the "Open Existing CWS/CMS Office" icon.

The "Open" dialog box will appear listing the CWS Offices in your county.

Select the office that you want the staff person to be in and click "OK".

**Open**

Select Item to Open  
CWS Office [v]  
Load

Open this CWS Office

	Local	County	Office #	Office Name	Phone #	Contact	Active	CACI
1	<input type="checkbox"/>	Sacrame		CPS	(916)000-8344	D, Gerrie	Yes	Yes
2	<input checked="" type="checkbox"/>	Sacrame	66.03	Downtown Sacran	(916)000-2127	W, James	Yes	
3	<input type="checkbox"/>	Sacrame	66.03	Training	(916)000-2117	S, Steve	Yes	

OK  
Cancel  
New  
Remove  
Sort...  
Retrieve Data...  
Help

# Creating a Caseload in CWS/CMS

Select the  
*Assignment Unit*  
for the caseload.

**Open**

Select Item to Open  
Assignment Unit

For this CWS Office

	Local	County	Office #	Office Name	Phone #	Contact	Active	CACI
1	<input checked="" type="checkbox"/>	Sacrame	66.03	Downtown Sacran	(916)000-2127	W, James	Yes	

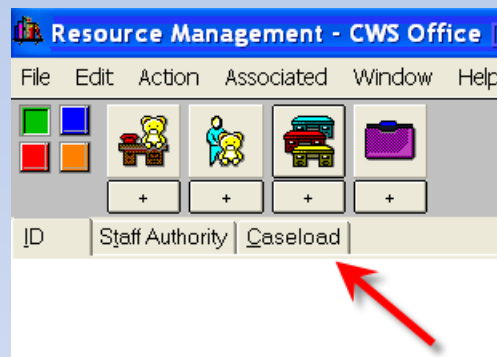
Open this Assignment Unit

	Local	Name	Supervisor	Phone
1	<input checked="" type="checkbox"/>	Adoptions	C, Michael	(916)000-2117
2	<input checked="" type="checkbox"/>	Assignment Desk	C, Michael	(916)000-2117
3	<input checked="" type="checkbox"/>	Emergency Response	W, Chris	(916)000-2110
4	<input checked="" type="checkbox"/>	Family Maintenance	J, Robert	(916)000-3323

OK  
Cancel  
New  
Remove  
Sort...  
Help

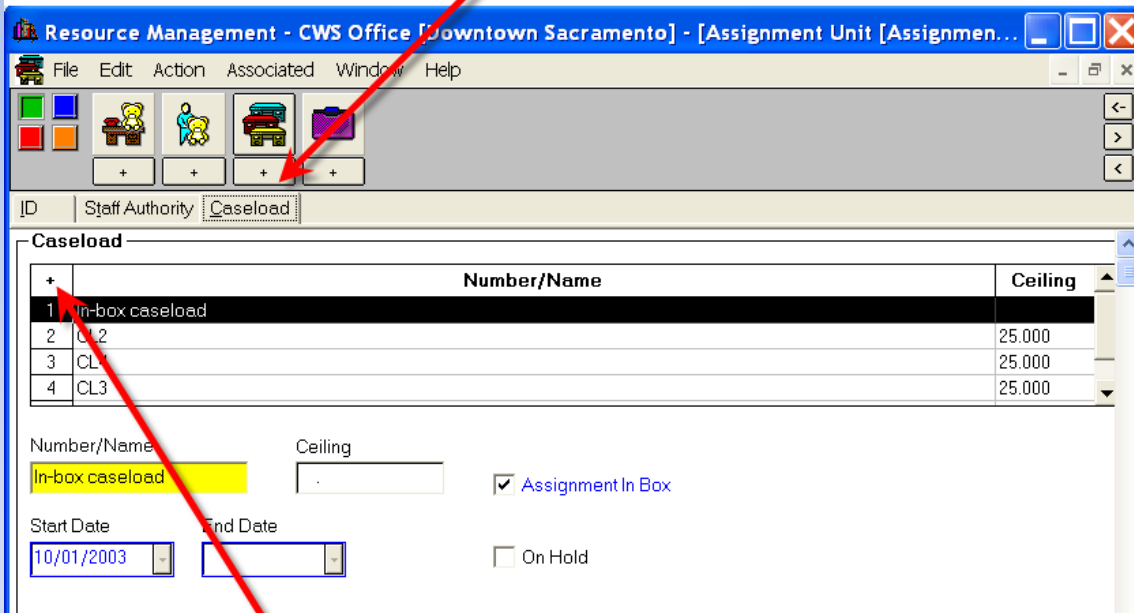
# Creating a Caseload in CWS/CMS

- Select the Caseload page



# Creating a Caseload in CWS/CMS

Select the *Caseload* page



The screenshot shows the 'Resource Management - CWS Office [Downtown Sacramento] - [Assignment Unit [Assignment...]]' window. The 'Caseload' tab is selected. The Caseload grid contains the following data:

	Number/Name	Ceiling
+		
1	In-box caseload	
2	CL2	25,000
3	CL1	25,000
4	CL3	25,000

Below the grid, the 'In-box caseload' row is selected, and the following fields are visible:

- Number/Name: In-box caseload
- Ceiling: .
- ☒ Assignment In Box
- Start Date: 10/01/2003
- End Date: (empty)
- ☐ On Hold

Click the "+" in the *Caseload* grid to create a new caseload. Complete the fields. By default, all new caseloads are assigned to the supervisor of the assignment unit.

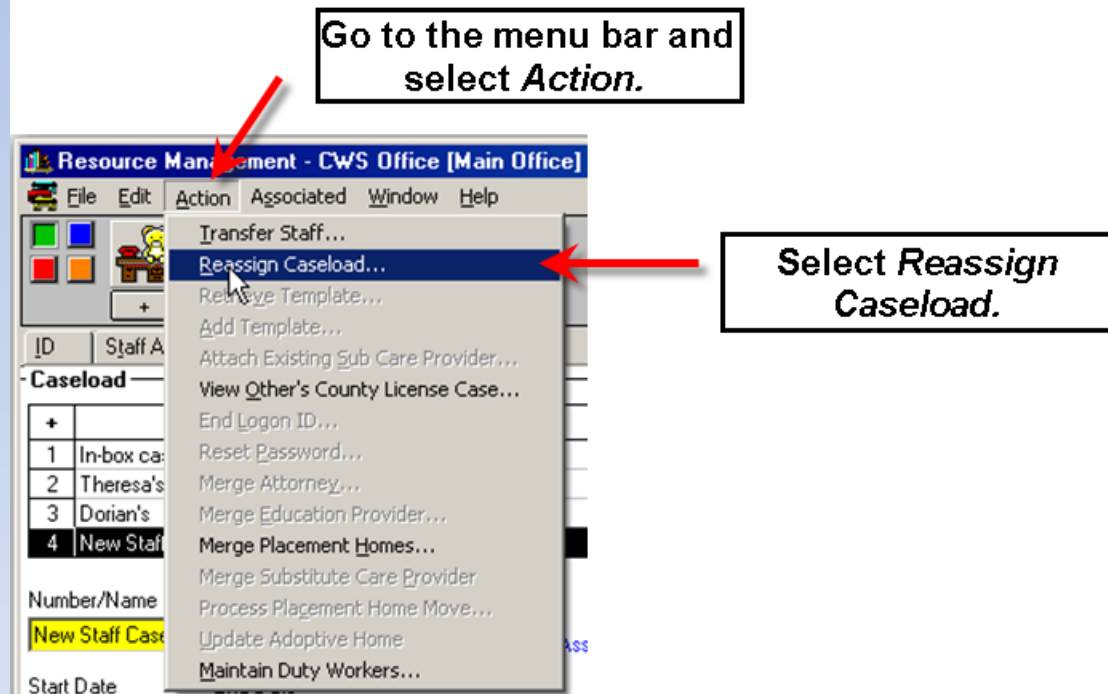
# ASSIGN CASELOAD TO A STAFF PERSON





# Assigning a Caseload

- To reassign a caseload:



# Assigning a Caseload

1.

For the caseload that  
will be reassigned  
(*From Staff Person*):

Select the *Office*  
Select the *Staff Person*  
Select the *Caseload*

The screenshot shows a 'Reassign Caseload' dialog box. It has two main sections: 'From Staff Person' on the left and 'To Staff Person' on the right. The 'From Staff Person' section contains dropdowns for 'Office' (Downtown Sacramento(Chi...)) and 'Staff Person' (C. Michael), and a list box for 'Caseload' with items: Adopt1, CL1 (highlighted), CL2, CL3, In-box caseload, In-box caseload, and In-box caseload. The 'To Staff Person' section contains dropdowns for 'Office' (Downtown Sacramento(Child...)) and 'Staff Person' (D. Paul), and an empty 'Caseload' list box. Between the sections are 'Add >' and '< Remove' buttons. At the bottom are 'OK', 'Cancel', and 'Help' buttons. Red arrows point from the first instruction box to the 'From Staff Person' section, from the second instruction box to the 'To Staff Person' section, and from the third instruction box to the 'Add >' and 'OK' buttons.

2.

For where the caseload  
is being reassigned (*To  
Staff Person*):

Select the *Office*  
Select the *Staff Person*

3.

Click the *Add* button  
Click the *OK* button

# Assigning a Caseload

Click the *Open Existing Staff Person* notebook

The screenshot shows the 'Resource Management CWS Office' application window. The title bar indicates the current context is '[Assignment Unit [Assignment...]]'. The menu bar includes 'File', 'Edit', 'Action', 'Associated', 'Window', and 'Help'. Below the menu is a toolbar with several icons: a person at a desk, a person with a magnifying glass, a person with a briefcase, and a briefcase. A red arrow points from the 'Open Existing Staff Person' instruction to the person with a magnifying glass icon. Another red arrow points from the 'Click the Caseload page tab' instruction to the 'Caseload' tab in the 'ID' section. The 'Caseload' section displays a table with the following data:

	Number/Name	Ceiling
1	In-box caseload	
2	CL2	25.000
3	CL4	25.000
4	CL3	25.000

A red arrow points from the 'The caseload will appear in the grid' instruction to the row containing 'CL3'.

Click the *Caseload* page tab

The caseload will appear in the grid

# Office Setup Summary

Create New Office



Create Staff Person  
ASSIGN  
AUTHORITIES & PRIVILEGES



Create Assignment Unit  
GRANT SUPERVISOR STAFF  
AUTHORITY



Create Caseload



Assign Caseload  
to Staff Person

